

★ **CREATING ECONOMIC GROWTH** ★



**&
JOBS
THROUGH
TRAVEL**



★ **TOURISM** ★

**A MANUAL FOR COMMUNITY
AND BUSINESS DEVELOPERS**



A PRELIMINARY REPORT
U.S. DEPARTMENT OF COMMERCE
United States Travel Service

CREATING ECONOMIC GROWTH & JOBS THROUGH TRAVEL & TOURISM

A MANUAL FOR COMMUNITY
AND BUSINESS DEVELOPERS

A PRELIMINARY REPORT

Conducted by  West Virginia
University

For:

United States Travel Service
Economic Development Administration

U.S. Department of Commerce

Employment and Training Administration

U.S. Department of Labor

Small Business Administration


West Virginia Governor's Office of Economic and Community Development

West Virginia University

SEPTEMBER 1978

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Preface

The need for design and definition of strategies for communities to use in fostering healthy local economies, stable or growing employment, and pleasant and compatible environments for their citizens has become increasingly urgent. And often when local communities actively undertake the task of creating such strategies their focus is too narrowly set on manufacturing industries, or too broadly fashioned around a concept of general retailing and services. Recent history suggests that these approaches may lead to failure, or only defer the problem which they are intended to solve.

This preliminary report summarizes a forthcoming manual for use by local businesses and communities which focuses on methods for designing investment strategies that are market oriented, and integrated with the overall economic, social, cultural, and natural environments of the community. It provides an organized approach to realizing the benefits of an area of development that frequently is overlooked or only partially recognized — travel and tourism. The reasons for this are many, including the lack of full recognition of travel and tourism as an industry by all levels of government, the diversity and fragmentation of the businesses and organizations that make up the industry, and the small business characteristic of most of these organizations. But the results of such myopic perceptions often lead to misapplication of community investment in areas of economic activity not suited to the community's resources and potentials — e.g., industrial parks where there is no appropriate infrastructure to support them — or the incomplete development of the tourism product — e.g., ski areas where there are inadequate facilities to lodge and feed the intended skiing visitors.

The *Manual* will provide step-by-step procedures for community and business leaders to use in evaluating existing travel and tourism resources, measuring potentials, organizing community resources and support, and designing and implementing plans to achieve these potentials. These procedures have been tested and verified in a demonstration project in Harrison County, West Virginia, and are especially applicable for the more rural and small city areas of the United States.

Major supplemental volumes to the *Manual* include a report on the actual plans, and the results of their implementation, in the demonstration project, a manual to assist communities in realizing the special potential of travel and tourism businesses to provide jobs for those categories of citizens often found among the chronically unemployed or underemployed — youth, minorities, and female heads of households, and a management assistance manual for privately owned campgrounds — one of the fastest growing but failure prone sectors of the travel industry.

It is hoped that this manual will help local communities in achieving their overall goals for improving their areas. While travel and tourism development will not be the total answer, it can make a substantial and unique contribution to these ends.

The project was sponsored by the United States Travel Service and the Economic Development Administration — both agencies of the U.S. Department of Commerce, the Employment and Training Administration of the U.S. Department of Labor, the Small Business Administration, the Travel Development Division of the West Virginia Governor's Office of Economic and Community Development and the Bureau of Business Research at West Virginia University.

The manual was developed at the Bureau of Business Research at West Virginia University under the direction of Dr. James M. Rovelstad. Major contributions to the development of the manual were made by Dr. Randyl Elkin, Dr. Horace Givens, Ms. Patricia Goeke, Dr. Kenneth Hock, Dr. Cyril Logar, Dr. John Pearce, Mr. Randall Roberts, and Dr. Linda Sypolt.

Special appreciation is given to two community organizations in the Harrison County area; the Travel Development Council, and the Mountaineer Country Travel Council — especially Ms. Sally Sternbach, its executive director.

PRELIMINARY REPORT

CREATING ECONOMIC GROWTH AND JOBS THROUGH TRAVEL AND TOURISM: A MANUAL FOR COMMUNITY AND BUSINESS DEVELOPERS

I. INTRODUCTION

The fastest growth sector of the United States economy over the past several years has been in the area of services. One of the largest segments of the service industry, although largely unrecognized as an entity in this country, is travel and tourism. In fact, travel expenditures by United States citizens and foreign visitors totaled an estimated \$115 billion in 1976 and accounted for six percent of our gross national product. In addition, it supported over four million jobs. Forecasters concur that the principal factors behind the growth and strength of the travel industry—rising discretionary incomes and increasing leisure time—will continue their past trends relatively unabated.

One aspect of the travel and tourism industry that has hidden its economic impact is the diversity and fragmentation of the industry. The travel industry includes all businesses that serve the traveler or tourist—hotels, motels, campgrounds and other lodging facilities; airlines, buslines, and railroads; plus restaurants, gift shops, and service stations; amusements, recreation facilities and a host of other businesses. Since most of these businesses also serve local area residents, the impact of spending by travelers can easily be overlooked or underestimated.

This very diversity, however, makes travel and tourism an ideal vehicle for economic development in a wide variety of regions and communities. The busi-

nesses that make up the travel industry draw upon local resources, customs, traditions and attractions to develop a product uniquely representing their community and region. Opportunities for development exist in all areas, even those not well suited to other forms of economic development. However, it is necessary that travel development be integrated into the total fabric of a region's economic planning, if its full potential is to be realized.

The travel industry has another special attribute. It has been found to offer a greater proportion of entry level jobs than other industries to segments of the labor force historically among the chronically unemployed or underemployed. Among these groups are young people, female heads of households, minorities and the elderly, as well as those who do not have specialized skills, experience, and well developed educational backgrounds. Moreover, these jobs are relatively more stable. Research by the U. S. Travel Data Center discloses that employment in the travel industry continued to increase during every calendar quarter of the 1974-75 recession, while it fell in the economy as a whole.

A. PURPOSE AND OBJECTIVES

One of the objectives of the Administration is to promote economic growth among cities, states, and regions. This requires the development of investment strategies which will most effectively utilize our

scarce resources. Travel and tourism development is just recently being considered as a major ingredient of economic planning.

This preliminary report summarizes the final manual which will provide tested guidelines for communities and regions to design and implement plans for economic development and growth through the travel and tourism industry. The manual is the result of a demonstration project designed around the specifics of a West Virginia environment, but has broad applicability to areas throughout the United States.

The project was initiated in the fall of 1977 and is scheduled to be completed in mid-1980. During the first year of the project a preliminary detailed five-year planning model has been developed. The second year is directed toward implementation and test of the plan. Specifically, it includes a comprehensive model for a five-year community development plan, and a planner's manual to assist local authorities in applying the model to their communities and/or areas. It is primarily written for use by county level organizations and governments with little or no formal training in economic planning and development.

The travel development guidelines are designed to particularly benefit the more rural areas in the U.S. For many such areas in the United States economic growth through traditional industrial development is not feasible nor practicable. Travel and tourism is an industry which appears to have one of the greatest potentials for such areas.

B. PROJECT SPONSORS AND PARTICIPANTS

The manual is the result of the cooperative efforts of federal and state governments, industry and citizens and takes into consideration the needs of tourists, residents and the industry, in a manner which most effectively utilizes the available resources of the community.

The project is being sponsored by the United States Travel Service and Economic Development Administration, agencies within the Department of Commerce; the Employment and Training Administration, Department of Labor; the Small Business Administration; West Virginia Governor's Office of Economic and Community Development and West

Virginia University. Future federal government sponsors of the project may include the Department of Housing and Urban Development and the Office of Education. Local organizations participating in the project include the Mountaineer Country Travel Council and the Harrison County Travel Development Council. Dr. James M. Rovelstad is directing the project at West Virginia University. (See Appendix A).

The *Economic Development Administration* (EDA) joined in sponsoring this project because it integrates economic development, it will result in a manual which is generalizable (e.g., it will result in a manual which will provide the tools for integrated tourism planning for other areas of the United States), and it involves participation by government, industry and citizenry. Additionally, these guidelines can be used by EDA to provide input into their "Overall Economic Development Program (OEDP)." In order to be eligible for EDA grants and loans, and area or district must meet certain EDA criteria (e.g., high unemployment or low per capita income) and must have a two year OEDP. These guidelines can assist an area in developing the tourism section of the OEDP for EDA funding.

A component of the manual which is being sponsored by the *United States Department of Labor*, provides methods to assess the impact that expansion and development in the travel and tourism industry in an area will have on employers and employment in the state. The effect upon the employment of the Title One Comprehensive Employment and Training Act (CETA) "significant segments" will be examined. The methodology focuses on the commonality of interests and needs (recruitment, screening and training) between significant segments and employers in the travel and tourism industry. Significant segments include segments which tend to have unemployment rates substantially and persistently greater than the labor force's in general (e.g., young people, minorities, female heads of households, handicapped, ex-offenders, older persons and persons of low educational attainment).

Another component of the project, which is being sponsored by the *Small Business Administration*, involves the identification of those factors which are relevant to the successful operation of a campground enterprise. These will provide the basis for a publication aimed at private campground owners or

prospective owners. The information developed from this project is designed to provide management and operational guidelines to assist these small business entrepreneurs in achieving adequate profits as well as providing a better product for the camping public.

The *Mountaineer Country Travel Council* (MCTC) region is one of West Virginia's seven Regional Travel Councils (RTC's). The Regional Travel Councils are continuing quasi-trade organizations. They are supported by membership fees from private sector businesses, local organizations, local governments, individuals and by grants from the state government. Their purpose is to provide a framework for integration of the travel-related interests of their regions, to undertake and/or foster development projects, regional promotion, and information programs, and to enhance the performance and growth of the travel industries in their regions. The RTC, and especially its executive director, for the region encompassing the demonstration county is, in effect, an unpaid member of the team.

The demonstration county *Travel Development Council* (TDC) is located in the MCTC region and is a volunteer group composed of community leaders from government, business, and other sectors. Its role is to advise the developers as to community strengths, weaknesses, and needs, provide ideas for evaluation, and to critique the plan as it is defined. The TDC includes representatives from all aspects of community life, e.g., government, general business—including banks and manufacturing, the regional economic development district, mayors' offices, and the development planning team.

C. DEMONSTRATION AREA

Development of the planning guidelines and manual involves comprehensive testing in one of West Virginia's 55 counties—Harrison County. Harrison County is located in the Mountaineer Country Travel Council region (MCTC). The MCTC is composed of nine counties: Barbour, Doddridge, Harrison, Lewis, Marion, Monongalia, Preston, Taylor, and Upshur. Exhibit 1 shows the location of this area of the state.

II. OVERVIEW OF THE MANUAL

The manual will consist of approximately twelve chapters including an introduction, an overview of

travel and tourism, the role of planning in economic development and tourism, inputs for planning and strategy decisions, conducting an inventory of resources, measurement of the economic impact of tourism, measurement of community and human resources, measurement of the business environment, profiling the legal environment, measuring the tourism market potential, planning the design of a marketing strategy, and implementing a plan. (See Appendix B).

III. INFORMATION NEEDS

Determination of the feasibility, practicability and desirability of tourism development in a community should take into account its compatibility and complementarity with other sectors of the environment, economy and the social needs of all area residents.

This involves obtaining the following types of information:

A. ECONOMIC IMPACT MEASUREMENT

One of the first steps involved in the development of marketing information for an area involves the measurement of the size and dollar value of the tourism market. The two basic components of this measurement include: 1) a determination of the revenues received by the travel industry in the area under study, and 2) a determination of the proportion of these revenues which can be attributed to tourism spending. This information provides a basis for the projection of sales revenues, employment, wages, and tax revenue generation at the county level. Traveler behavior profile information may or may not be obtained during this step or, it may be obtained from other sources, depending on the technique used.

The manual will incorporate the economic impact measurement techniques utilized in West Virginia. The methodology used in West Virginia involves the use of a computerized model of the travel industry and an annual survey of travel industry businesses. This model, called TRAITS (Travel-Tourism Analysis and Information System) includes a lodging/camping sector component, a traveler spending component, and a traveler behavior profile. (See Appendix C).

Relationship Between Region VI, Mountaineer Country Travel Council, Harrison County, and West Virginia's County and Regional Travel Council Sub-Divisions



The overall response rate for the 1977 West Virginia economic impact survey was 52%, and was sufficiently representative statewide to allow economic impact analysis at the county level for all but 13 of the 55 counties and publication of total sales figures by county for all but two counties. Exhibit 2 shows the results for one year's analysis.

B. MARKET DEFINITION

Development of a marketing strategy requires definition of present and potential travel customers in terms of who they are, e.g., demographics, origins, purpose of travel, likes and dislikes, travel party

sizes, and all factors that ultimately will determine the specific types of product, promotion, price and distribution appropriate to effectively market the region's tourism product. This is known as market segmentation.

Principal sources of market segmentation information for West Virginia and the demonstration region include a state-wide field survey of travelers, a survey of parties writing for state/local travel literature, registration logs from travel information stations and visitors attractions (e.g., glass plant tours), hotel/motels registrations, and the U.S. Bureau of Census' National Travel Survey. These data were assembled, cross-classified, and analyzed to yield a composite of the major travel market segments for the region.

Economic Impact of Travel Business Reaches Every Region and County

Upper Ohio Valley Travel Council Region

County	Total Sales (Million \$)	Employment	Wages and Salaries (\$1000)
Brooke	6.6	383	1,862
Hancock	6.2	359	1,743
Marshall	3.0	175	850
Ohio	23.3	1,357	6,591
Wetzel	4.8	280	1,359
Regional Total	43.9	2,256	12,416

Country Roads Travel Council Region

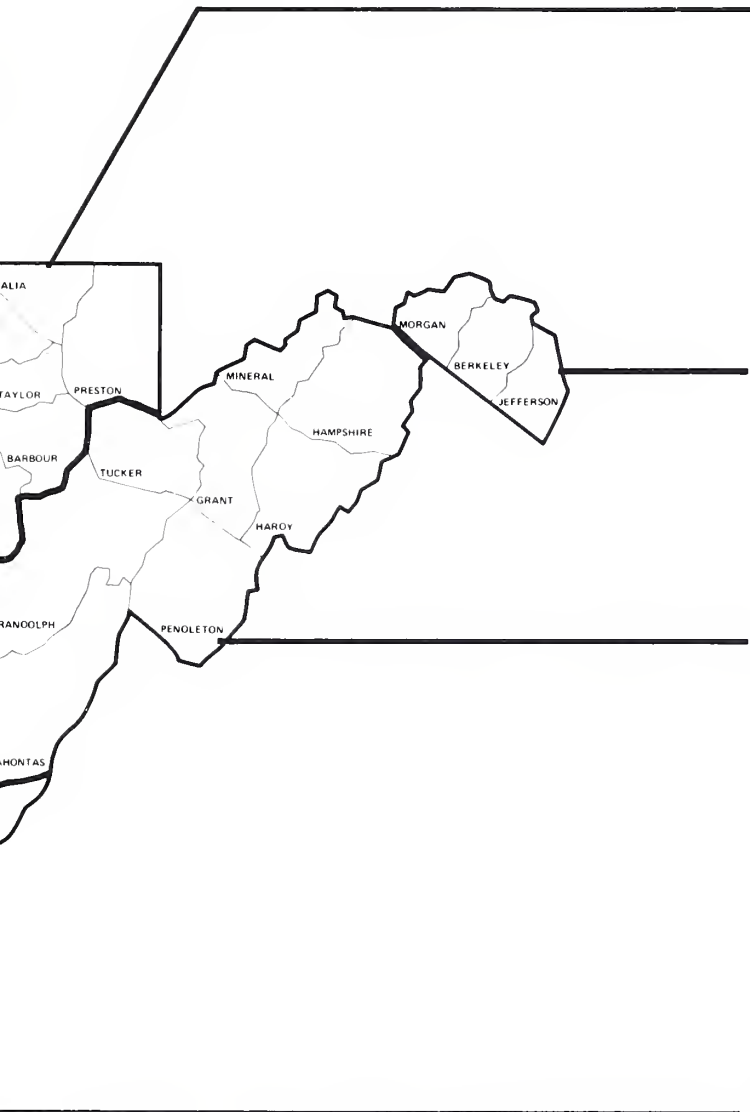
County	Total Sales (Million \$)	Employment	Wages and Salaries (\$1000)
Braxton	4.2	247	1,202
Calhoun	.5	*	*
Gilmer	1.3	77	374
Jackson	8.4	488	2,370
Pleasants	.9	*	*
Ritchie	1.7	99	480
Roane	.9	*	*
Tyler	1.9	113	551
Wirt	*	*	*
Wood	23.0	1,340	6,511
Regional Total	43.5	2,533	12,302

Nine Valley Travel Council Region

County	Total Sales (Million \$)	Employment	Wages and Salaries (\$1000)
Boone	1.5	*	*
Cabell	45.3	2,642	12,831
Clay	.02	*	*
Kanawha	120.9	7,049	34,239
Lincoln	.07	*	*
Logan	7.2	422	2,049
Mason	6.0	351	1,705
Mingo	4.7	*	*
Putman	4.8	278	1,350
Wayne	3.1	179	869
Regional Total	194.9	11,361	55,184



*Insufficient data to estimate. Where possible estimated total industry sales are provided.



Mountainier Country Travel Council Region

County	Total Sales (Million \$)	Employment	Wages and Salaries (\$1000)
Barbour	3.2	184	894
Doddridge	*	*	*
Harrison	21.6	1,258	4,983
Lewis	2.5	*	*
Marion	13.0	760	3,691
Monongalia	24.7	1,439	6,990
Preston	5.2	302	1,466
Taylor	4.7	274	1,331
Upshur	8.1	472	2,291
Regional Total	83.1	4,845	23,532

Eastern Gateway Travel Council Region

County	Total Sales (Million \$)	Employment	Wages and Salaries (\$1000)
Berkeley	11.8	685	3,328
Jefferson	16.0	931	4,523
Morgan	8.4	490	3,380
Regional Total	36.1	2,107	10,234

Potomac Highland Travel Council Region

County	Total Sales (Million \$)	Employment	Wages and Salaries (\$1000)
Grant	4.5	264	1,283
Hampshire	5.3	310	1,506
Hardy	1.9	110	534
Mineral	2.9	171	830
Pendleton	3.9	230	1,117
Pocahontas	9.7	564	2,738
Randolph	8.8	512	2,488
Tucker	9.3	544	2,643
Webster	2.1	124	605
Regional Total	48.6	2,833	13,763

Mountainaire Travel Council Region

County	Total Sales (Million \$)	Employment	Wages and Salaries (\$1000)
Fayette	8.2	475	2,310
Greenbrier	106.4	*	*
McDowell	2.4	138	670
Mercer	33.7	1,967	9,555
Monroe	.4	*	*
Nicholas	8.1	475	2,306
Raleigh	22.9	1,335	6,483
Summers	5.7	335	1,626
Wyoming	9.2	*	*
Regional Total	197.1	11,490	55,810

C. INVENTORY OF TRAVEL RESOURCES

The purpose of the inventory is to obtain a comprehensive summary of all travel related resources—facilities, infrastructure, natural and historic sites, attractions, special events, and to obtain information on the industry's current levels of activity.

The inventory analysis could include:

- Recreation Facilities
- Outdoor Activities
- Parks
- Natural Wonders and Scenic Views
- Flora and Fauna
- Hunting Areas and Renowned Fishing Areas
- Historical and Archaeological Sites
- Scientific Attractions
- Interesting Institutions
- Homes of Celebrities
- Art Activities
- Shopping Opportunities
- Special Events
- Local Sports Events
- Camping Facilities
- Restaurant and Food Specialities
- Hotel and Motel Accommodations
- Convention Facilities
- Complete Resorts
- Second Home Developments
- Transportation
- Musical Activities

The format used for data collection was a “questionnaire” containing individual data collection forms for each type of resource. For most categories, a separate form was completed for each area. The most important data were coded for analysis. Appendix D provides an example of one of the types of tables that has been developed from the data.

Even though the demonstration area in West Virginia focused in one county, the inventory was conducted in all seven Travel Council Regions since knowledge of nearby attractions-facilities will contribute to the development of marketing strategies for the area.

D. HUMAN RESOURCES SURVEY

It is important that community developers obtain information on resident attitudes, knowledge of the impact of tourism, expectations and tourism labor force potential.

In West Virginia several important findings were made from the household survey in Harrison County. These may be grouped into three areas—perceptions of the impact of increasing tourism activity in the county, perceptions of jobs and job opportunities in local touristic enterprises, and perceptions of their own community as a tourist attraction.

County residents, on the whole, reported very favorable attitudes toward the growth of tourism in their communities, with 93.6% of the responses indicating that the net effect of increasing tourism would be positive. Looked at from the opposite view, 68.6% would view the loss of tourism business as having a serious to extremely serious negative effect on the county. Even though nearly all respondents were positively disposed toward tourism, the data provide insights as to which factors (e.g. sex, education, and employment status) discriminate between those most favorably disposed, and those somewhat less favorably disposed.

Attitudes toward potential personal employment in tourism-related businesses were on the whole not strongly positive. Much of this probably can be attributed to the fact that the vast majority of respondents were from households whose household head has attained a job level substantially above the entry level non-skilled status perceived available to the respondent for the listed tourism jobs. Nonetheless, some jobs were perceived as more/less attractive than others. Those seen as relatively more attractive were land/wildlife/forest jobs, travel agency jobs, and recreation-related jobs. The least favorably regarded jobs were in service stations, driving taxis, and in night clubs. The reasons given for higher rated choices were that they offered more favorable physical and/or human work settings, or an opportunity to meet people—customers. The first two also were the most frequently cited reasons for negative job skills. The discriminators between the more and less favorable job ratings are occupation, years of county residency, age, education, renter/owner status, and attitudes toward tourism's potential effects on the community and personal finances.

A final area of information is a measure of the community's cognitive level of awareness of itself and the features that might be attractions for tourists. The results here were dramatic, with the average householder being aware of none, or only one thing that would be of interest to a visitor. Actually a limited study of the inventory reveals dozens of possibilities.

The results of this type of survey serve several vital needs for the developer/planner.

1. Determination of the probable support, or resistance, likely to be encountered if development is undertaken.
2. Identification of the areas and issues which will have to be addressed in publicity and public relations programs as the planning and development process gets underway.
3. Identification of the types of persons most likely to be interested in and need the jobs created through development.
4. Provision of a basis for a community awareness/communication program so that residents are better able to project themselves and the community to the tourist.

E. SURVEY OF BUSINESS AND FINANCIAL INSTITUTIONS

As with the community's human resources, it is important that the planner/developer know how the local business community will accept and support growth in the tourism industry, (e.g. whether there is the potential for obtaining loans from local financial institutions). The business surveys were supplemented with data from secondary sources, which are discussed below.

One area of inquiry was to determine the perceived effects that an increase in travel and tourism would have on 20 aspects of the community's business life. Among these were operating costs, sales volume, amount of customer traffic, attractiveness of respondents' business location. In the demonstration county, forty-seven percent of the respondents stated favorable attitudes toward increased travel and tourism. Based on the analysis, businesses were classified as either travel or non-travel related. The former indicated a more favorable perception of in-

creased tourism than non-travel-related businesses. Travel related businesses perceived more positive effects for all but one of the twenty factors.

Travel and tourism is perceived to have its most favorable effect on the community's image, the sales volumes of businesses and the amount of customer traffic. Least positive effects were perceived for customer theft prevention, parking facilities and business operating costs. These points will be important as implementation of the development plan progresses.

Another area examined is that of cooperative and independent activities which businesses might undertake to encourage travel and tourism. Sixty-eight percent of all the responding businesses in the demonstration county indicated they took part in some or many activities to promote or encourage travel and tourism. Travel businesses lend more cooperation to promote tourism, provide more traveler services and do more to promote travelers' interests than non-travel businesses.

The *perceived* impact of travel and tourism within the county on retail sales, employment and wages and salaries paid indicated general underestimation of that impact. Only 10% of the respondents accurately estimated that impact, while 7% overestimated the economic impact of travel and tourism. The remaining 83% of the respondents underestimated the impact. The degree of underestimation ranged from 60% who moderately underestimated, to 23% who extremely underestimated the benefits of tourism in their community. Both travel and non-travel businesses tend to underestimate the local impact of the travel industry in terms of traveler expenditures and employment. In terms of wages and salaries, both groups tended to overestimate the impact, but travel businesses were somewhat more accurate than non-travel firms in their perceptions of the impact of tourism. Here, too, is a need for an information effort.

A separate survey of financial institutions is needed to determine the attitudes toward and awareness of the travel industry among bankers, and the level of service and support provided by the banking community for the growth of the travel and tourism industry. This encompassed eight (8) banks in Harrison County. Data also were obtained through the Federal Deposit Insurance Corporation (FDIC) and from its publication, *Bank Operating Statistics, 1976*. A com-

puter summary also was provided by the FDIC. It covers financial data reported by the Harrison County Banks to the FDIC. The reported aggregate data were used to compare the asset and liability structures of Harrison County Banks to similar data for banks from selected areas of the United States having a comparable banking structure, and business/tourism environment.

Comparisons of the FDIC data indicated that Harrison County banks are supportive of local community business, but the loan portfolios of Harrison County banks tend to be proportionally smaller than those of other comparable banks. The percent of total bank assets loaned out to commercial and industrial enterprises is relatively high. The analysis also suggests that area banks have a relatively high aversion to risk as indicated by their comparatively larger percentage investment in U.S. Treasury securities, tax-exempt securities and federal funds. Ratios for other aspects of the banks' operations also suggest that Harrison County banks do not have high levels of risk in either their capital structure or their deposit structure.

The most important factor influencing the decision of bankers in determining loan approval, given an adequate formal credit rating, is risk. The risk considered here is not revealed in the banks' formal credit analysis but may include the loan loss experience of the bank with similar businesses. Another important factor in the decision making process is the benefit of the business to the community.

Unfortunately, travel and tourism businesses (motels, campgrounds and amusement parks were the examples used) did not rank very highly as firms to which these banks would like to make loans. The seasonal nature of the campground business resulted in negative ranking for that business. Thus, efforts will have to be made to counter these perceptions by bank officials.

Bankers also were asked to rate the effects of increased travel and tourism. The bankers responses agreed with business responses that increased tourism would have positive effects on customer traffic at their business location, the image of the community, and increased business, in this case the bank's deposit growth and loan demand.

Bankers perceived negative effects in the areas of ability to prevent check cashing losses, ability to re-

tain current loan interest rates, the relationship of taxes and government services to their business, and the availability of parking facilities for their customers. There also was unanimous agreement among residents, travel and non-travel related businesses, and bankers that increased tourism would have a negative effect on the availability of parking.

Bankers tended to underestimate the impact of travel and tourism on retail sales, employment, and wages and salaries, though of the six responses regarding wages and salaries there was one correct response, two overestimates, and three underestimates. Thus, the banking community is no more aware of the impact of travel and tourism than the business community at large or the residents of the county.

With regard to providing services for tourists, most Harrison County bankers would consider expanding the services provided, but there was general agreement that the demand for the services should come first, rather than offering the service in order to create the demand.

F. CHRONIC UNEMPLOYMENT ANALYSIS

The special potential of the travel industry is to provide jobs for some segments of the population among the chronically unemployed—young people, minorities, and female heads of households. For a development plan to be successful in achieving this, data on these segments must be collected and analyzed.

This part of the demonstration project involves an analysis of the area's population to determine the size, location and identity of the target population segments, and to develop a communication/motivation effort to get the chronically unemployed into the employment stream as new or replacement travel industry jobs open up.

Additionally, the project focuses on developing interest and acceptance among travel industry employers in hiring these individuals. While equal opportunity programs provide a substantial motivating force for this, it is important that employers be positively motivated to seek out and hire these persons. Most such businesses are too small to be readily visible to enforcement officers, because none are by themselves major employers.

The first phase of this must be an examination of the characteristics of the rural poor in the labor market area. The second phase is an analysis of the demand side of the area labor market, its occupational composition, and information flow mechanisms. A short run demand projection for labor in the demonstration market area must be made, and the information and data used to develop means for coordinating the needs and interests of employers with the needs and interests of the hard core unemployed in the area. Particular attention should be given to the potential for utilization of training and education capabilities in the area, including Comprehensive Employment Training Administration (CETA) prime sponsors.

The format of the analysis of the supply side of the labor market is a detailed CETA Title One Plan. In West Virginia, the CETA provisions are administered on a statewide basis, with the CETA prime sponsor in Charleston. A division of the Governor's Office of Economic and Community Development is the liaison with the Bureau of Employment Security. All statistics for use in West Virginia CETA Titles are therefore statewide. Since this study requires a comprehensive analysis of the Harrison County area, more disaggregated data are necessary.

The Clarksburg/Harrison County labor market area was delineated by analyzing worker commuting pattern information. The entire labor market is confined to an eight county area. Since only 5% of the labor force commutes into or out of this county, concentration is on Harrison County itself. The eight county area is included where influences in either direction are substantial enough to warrant inclusion.

The Harrison County population had declined by over 6% between 1960 and 1970, but has shown slow but steady growth since 1970. Clarksburg is part of a three city growth center including Morgantown (Monongalia County) and Fairmont (Marion County). The Harrison County predicted population for 1980 is 79,000 persons which exceeds the 1960 peak and is substantially above the 1970 figure of 73,000. The population decline of counties surrounding Harrison also has ceased, and moderate growth is projected for them as well.

The 1975 labor force participation rate for Harrison County was 57% with 27,520 employed and 2,360 unemployed persons in the civilian labor force. Blacks showed a substantially higher than average rate of 66%.

Fifty-two percent of black women were in the labor force compared with 35% of their white counterparts. To put this in perspective, however, only 1-1/2% of the labor force is black.

The unemployment rate was marginally higher for women at 8.8% than for the overall average (7.9%). An analysis of unemployment rates by age and last occupation indicates nonwhites have a uniform distribution across jobs while whites show a relatively high disemployment from service and structural occupations. The service jobs characteristically exhibit higher turnover. The structural terminations are indicative of a drop in final demand.

Transfer payments to Harrison County recipients are substantial. The county figures include 1,348 on Supplemental Security Income, a March 1977 high of 100 Aid for Dependent Children (AFDC) unemployed fathers, and 800 total AFDC cases. Food stamp recipients averaged above 2000 in number.

The analysis of employer demand and information flows employs an unstructured interview technique, supplemented with data from secondary sources, to determine the occupational structure, projected occupational demand, and recruiting and training methods of the travel and tourism industry. The planned interviewing technique uses the "Office of Employment Security (OES) Staffing Patterns" industry-occupation matrix as a basis from which to proceed. These interviews will yield occupational distributions, and more importantly, the linkages between occupations. The extent to which these employers follow an internal labor market model, or a competitive model, is important.

Recruiting, screening and training typically depend substantially upon the type of employer organization. The suitability of these employers for placement of hard core unemployed will be determined from the detailed analysis of interview results.

G. DEVELOPMENT OF CAMPING FACILITIES

One possibility that community developers may wish to explore is that of providing new or expanded camping facilities for travelers. Historically campgrounds have been developed in publicly owned areas. Such campgrounds were of a primitive variety and provided basic facilities, which catered to a

camping public satisfied with more rustic accommodations. More recently, the growing numbers of campers and the increased affluence of persons seeking outdoor recreation in campgrounds have produced a two-fold change in the former pattern of campground development. First, there has been an explosive growth of privately owned and operated campgrounds, far outstripping the growth of public facilities. During the period 1956-1970, private campsites increased 1,380% as opposed to a 114% increase in state forests and state parks. Second, and of great significance to the prospective campground developer, is the fact that many new campers seek more in the way of facilities than did the earlier campers. These include such amenities as showers and flush toilets, recreation halls with television, pin-ball machines, movies and other entertainment, dumping stations for trailer wastes, grocery stores, and full hookups including water and electricity. Provision of such facilities of necessity requires that the campground owner be prepared to invest considerably more money than was the case in establishing a primitive campground.

Although large franchising organizations play an important role in private camping facilities, the majority of campgrounds are developed by independent business persons. These entrepreneurs are hampered by the same problems of limited management training and inadequate financing that characterize small business in general. Guidelines have been developed for small retail stores and/or manufacturing establishments, but many of these are not appropriate for use by campground operators and owners due to the types of locations involved and the unique services offered. As a result, the profit record of privately owned campgrounds has, in general, been poor. Data on the profitability of independent, private campground operations is sparse, but it is known that well-managed, private operations can and do return 10% or more on invested capital after deduction of managerial salaries. In some cases, such operations have reached profitable levels of operation in the first or second year.

However, these are the exceptions rather than the rule. In 1975, West Virginia University conducted a study of United States Army Corps of Engineers concessionaires in which the financial statements of 94 businesses from all parts of the United States were examined. Of this sample some 41 firms (44%) operated at a loss for the one year studied and the average operating result for all 94 firms was a *loss* of \$2,689.

Guidelines for private-sector campground developers are a major supplemental volume to the manual. They are designed to provide assistance in the operation of private campgrounds to enhance the profitability of the entire operation, e.g., site rentals, cost controls and accounting, marketing, financing, ancillary activities such as stores, equipment rentals, and similar operations. These guidelines offer specific advice and counsel in regard to all phases of campground management and administration. Pitfalls experienced by unsuccessful operations are indicated, and the methods by which successful campground operators have avoided such pitfalls are described.

Specifically, the areas covered in the manual include type, location and size of campground, and the degree of onsite and offsite facilities. In addition, capitalization and labor requirements needed by campground owners are discussed as well as management control and factors affecting utilization.

H. LEGAL ENVIRONMENT PROFILE

A legal environmental study is aimed at providing planners and developers with the needed information about the impact of the law on land and business development. The scope of this study is limited to those aspects of government regulation that have implications for the development of a single industry, travel and tourism. While the scope of the study is limited to this single phase of business regulation, there is a wide variety of legal factors worthy of consideration. The relevant factors range from the federal government's attempts to control the quality of our environment to such diverse matters as state and local liquor laws, franchising of taxi cab companies, amusement taxes and restraints on billboard advertising, to name only a few. Although the legal factors impacting on tourism development are quite varied, they can be organized into eight basic categories:

1. Environment and land uses; air and water quality controls, soil conservation, flood control regulations, subdivision ordinances, zoning, etc.
2. Public health and safety; hotel/restaurant standards, sewage system controls, solid waste disposal regulations, building codes, etc.
3. Transportation;

4. Recreational activities, facilities and attractions; restraints on gambling, sale and consumption of alcohol and racing, fishing and hunting regulations, boating rules, etc.
5. Taxation;
6. Business organization and trade; corporation and partnership laws, regulation of franchising, trade regulations, etc.
7. Advertising;
8. Employment; minimum wage and hour laws, child labor restrictions, workmen's compensation laws, etc.

A legal study explores these topics from the point of view of the private individual planning to initiate or expand a tourism-related facility or attraction in a given area. This analysis of the planning, construction and operation phases of a private development project, sets forth the relevant federal, state and local laws and the public agencies and bodies that administer those laws. Further, it outlines the impact of the laws and their administration procedures on the tourism project.

As a single example, the Federal Water Pollution Control Act (F.W.P.C.A.) and state water quality control statutes have important implications for some types of tourism facilities, such as campground or water recreation facilities that are located on or near streams, lakes, etc. In the first place, the F.W.P.C.A. empowers the federal Environment Protection Agency (EPA) to promulgate standards for water quality. The Act also authorizes the EPA and the Army Corps of Engineers to administer a permit or licensing procedure under which persons discharging pollutants into navigable waters thereby affecting water quality, must obtain approval for their activities. Of the types of pollutant discharges covered by the F.W.P.C.A.'s regulations, the two most likely to be discharged as a result of the construction or operation of a tourism facility are sewage and dredge and fill materials. A permit from the EPA is required for facilities discharging sewage and one from the Corp in the case of dredge and fill discharges. In both cases obtaining and retaining the permit is conditioned upon compliance with specified quality standards. Therefore, a person constructing or operating a facility centering around a body of water may well find it necessary to obtain one or both of the permits.

A pollutant discharge must also comply with state environmental restrictions, which may be stricter than those contained in the federal regulations. In some states, the state water control agency simply administers the federal permit system, so a single permit is necessary to satisfy both state and federal law. In many other states, the state permit system is a separate procedure altogether, necessitating that a person obtain both a federal and state permit.

The findings of the legal study are divided into two segments: 1) the impact of federal, state and local laws on tourism projects of all sizes located within the boundaries of the United States, and 2) the laws pertaining to the specific area being analyzed.

IV. DEFINITION OF A PLAN AND STRATEGY

This section describes the initial efforts needed to define a development and investment strategy for the travel and tourism industry in a state and its subregions. The basic steps necessary for any comprehensive plan are described in the context of the specific methods and approaches applied in West Virginia. Other regions and states might substitute alternative methods and approaches.

A. DEFINITION OF A PLAN

Regional plans, rather than state-wide plans, were determined to be most appropriate as the starting point in West Virginia because:

1. Different regions within the state have different potentials and different needs. This is especially true for relatively rural areas as opposed to urban areas. Often, these rural areas are the ones with the greatest need for economic stimulus, and have the least capability to initiate development.
2. For regional plans to be acceptable to the residents they most affect, the plans should be derived from a strong emphasis on local initiative and involvement.
3. Plans should be developed that are harmonious with each region's unique industrial, social, legal, cultural and political environments.

The planning outline used in West Virginia is as follows:

B. MODEL PLANNING OUTLINE

1. Introduction

2. Objectives

3. Profile of the County and Surrounding Regions

Includes a discussion of: physical/geographic make up, residents, business and industry, political structure, financial institutions, labor pool, legal environment, land ownership and distribution, relationship to neighboring counties and MCTC region, and organizations and agencies.

4. Travel Industry-present

Includes such items as the size and type(s) of travel offerings, inventory of resources, performance and potential, attitudes of local residents, and characteristics of travel customers.

5. Needs for Development

Includes items such as more optimal utilization of present facilities, local public relations (e.g., business and residential), and long term growth (private investment involving improvements to existing business as well as new development and public investment).

6. Short Run Growth Strategy

Includes a discussion on the use of existing facilities, the marketing strategy (general policies and goals, product, price, promotion, distribution), and community and industry awareness.

7. Five Year Development Strategy

Includes a discussion on overall goals and strategy; principal product offerings such as lodging, camping, restaurant, transportation, attractions, sports and recreation events; investment needs and strategies; and sources of funds.

8. Special Considerations

Includes a discussion on labor pool development, lodging, managerial development, legal/political aspects (regulations and taxes), and relationships to other area businesses and industry.

9. Implementation strategy

Includes scheduling, funding, community/county/regional/coordination and management, and integration with state-wide strategy.

10. General guidelines and relationships to other areas.

C. COMMUNITY IMPACT ACTIVITIES

The measurements and assessments described earlier will lead to a number of community activities for the development and promotion of the travel industry itself. Among these are the following.

1. Marketing — A two-stage marketing strategy is appropriate to use. The first stage is a short-run strategy aimed at optimizing the performance of the existing industry. This strategy was implemented cooperatively with the local community, the state travel development agencies and the project team. The second stage of the marketing strategy is longer run, after private and/or public capital investment are attracted into development of new or improved facilities. The marketing activities include:

- a. Development and distribution of brochures and promotional materials through current as well as newly developed outlets e.g., regional AAA offices.
- b. Development and implementation of a media campaign, directed at the principal market segments, probably within a limited region (100-200 mile radius).
- c. Opening distribution channels for area businesses through regional travel agents.
- d. Development and promotion of new “package” arrangements for shoulder and off peak season periods, and other low occupancy periods.
- e. Working with local groups to foster development of new special events.

- f. Identification of facilities for improvement or expansion.
- g. Identification and data development for sites with potential for new facilities.
- h. Working with state, local and federal governments to obtain needed public facility improvement, (e.g., the development of the tourism section for the Overall Economic Development Program — OEDP).

2. Community Information and Awareness — Public awareness and acceptance of the travel industry is a significant problem. For example, a survey of local residents in one major tourist destination area of West Virginia disclosed that virtually no one recognizes tourism, or travel related businesses, as playing a substantial role in the local economy. Yet tourism had contributed something in excess of \$15,000,000 to this economy during the previous year, or over \$200 per resident. Thus, remedial action is needed. A community awareness and information program to inform the public about the present significance and potential benefits of the travel industry to the area, is appropriate, and in West Virginia includes:

- A. Preparation and distribution of regular news and public relations and information releases to the local news media.
- B. Continuation of the Travel Development Council, and through them initiation of a community involvement program to identify significant local leaders with travel and tourism.
- C. Joint development with the regional travel industry leaders of programs to be presented to local civic groups.

3. Industry Awareness and Identification — Industry awareness and identification issues and needs are determined in detail from the Omnibus Business Survey.

4. Human Resources Development — The travel industry, a service industry, relies on interrelationships among people — service providers and customers. Thus human resources, as employees, managers, and entrepreneurs, are of vital importance. The status of the “inventory” of human resources is one of the measurements described earlier. A variety of opportunities for development of a region’s human

resources is identified in the manual. One aspect of such development needs is the general need to increase awareness, understanding and appreciation of the industry by the employees and employers of the industry. This and other needs are addressed through training courses.

D. MARKETING STRATEGY: SEGMENTATION STUDY AND SHORT RUN OPTIMIZATION STRATEGY

The first objective involving the economic impact measurement provided information on the economic impact of visitor spending in the area/site.

The second objective is to establish the area’s markets for travel and tourism through market segmentation and consumer behavior studies. Research indicated that about half of all West Virginia’s travel market are out-of-state residents, and that for the most part these out-of-state residents come from within 200 miles of the state’s borders. It was further established that there are special demographic characteristics and lifestyles that characterize these travel consumers. For example, West Virginia tends to attract relatively more travelers in the higher income and higher educational level groups than the U.S. averages for travelers as a whole. It also was found that there are, for the present, two market segments that yield the vast majority of pleasure traveler sales. These are the people interested in either camping and outdoor recreation, or sight-seeing.

The specific data used in the analysis of travelers to the Mountaineer County Travel Council included information on the origin of the visitor, mode of transportation used, length of stay, activities and purpose of trip and demographics of the visitors.

These characteristics of the traveler to the region, and the available attractions and tourist facilities in the region provide the basis for a short run strategy that will focus on those most likely to be traveling in the region. This information provides the basis for short-run promotional efforts for the community.

E. MARKETING STRATEGY DEVELOPMENT

This background information was necessary to define a marketing strategy. A marketing strategy

consists of four principal elements: promotion, channels of distribution, pricing, and product. The basic information on consumer behavior and economic impact provide important criteria around which to define a marketing strategy.

With respect to promotion, the research provides an understanding of the kinds of media to which the highest potential number of pleasure travelers are exposed. It also identifies the best geographic areas in which to place advertising and distribute literature. Furthermore, it disclosed much about the kinds of information sources used. It is of some interest to note, for example, that in West Virginia 25% of the overnight travelers select the motel or hotel in which they will stay while en route, by using directly observed roadside advertising, or by seeing the lodging place itself. This is especially important in evaluating the impact on older established motels and hotels of the opening of the interstate highways, and the concomitant restrictions on roadside advertising.

An important demonstration project discovery is that West Virginia and its travel businesses have been underutilizing the existing channels of distribution. Among these are the traditional travel agents, the American Automobile Association, and tour packagers.

Price appears to be a factor which gives West Virginia a relative advantage. Field surveys indicate that visitors from out-of-state do not perceive West Virginia as expensive relative to other vacation travel destinations. This suggests an opportunity to develop more luxurious accommodations in some areas. But, perhaps most importantly, West Virginia's regional market was found to have immense untapped potential.

Visitor surveys showed that they are very pleased with the "natural" product when compared to other destinations. Moreover, they gave West Virginia's people high ratings in terms of their overall friendliness and attitude toward visitors.

Two significant product problems were found, however. The first is that West Virginia has relatively few facilities to take care of the needs of visitors, given the market potential and the size of the state. There also is a shortage of entertainment and the more organized things for people to do while they are on a pleasure trip. Secondly, West Virginia service industry employees are not always as well informed on the basic principals of playing the part of host and

providing information to out-of-state guests as they might be.

F. MARKETING: LONG-RUN STRATEGY DEVELOPMENT

The long run marketing strategy development effort focused on three types of activity.

- 1) Analysis of existing resources and demand potential to identify gaps where new private or public development might profitably be undertaken.
- 2) Evaluation, in conjunction with short run strategy analysis, of existing sites or facilities, which might be suitable for further development but would require more than one year.
- 3) Coordination with, and technical assistance to demonstration area leaders, and state travel development personnel in planning for major new tourism facilities.

Major classes of facilities, including lodgings, eating and drinking places, campgrounds, attractions, and outdoor recreation facilities must be examined through on-site visits, in the context of the overall travel activity, and patterns of traveler behavior in the area. While the West Virginia analysis is not yet completed, preliminary indications are that the major development efforts in the plan will include more development of activity-related facilities, and camping facilities.

Needs for some public investment also were identified, and in one case — interstate rest stop facilities, the State Department of Highways has begun the process of implementation in Harrison County.

One outcome of a Harrison County Travel Development Council (TDC) meeting was the concept of a downtown Clarksburg tourism facility consisting of a 150 room hotel, convention center, West Virginia industry and crafts demonstration center and a 500 car, multi-story parking structure. The concept would incorporate private financing of the hotel and possibly part of the industry crafts center, local financing of the parking structure, and local/federal financing of the convention center.

During July 1978, the Clarksburg city council entered into a \$38,000.00 contract with consulting firms to

prepare preliminary architectural and detailed feasibility analysis plans. This is a major component of the long-range plan for the county's tourism development.

Site visits were made to attractions, or potential attractions, as identified in the resources inventory. Many of these may be incorporated into the short run marketing strategy. The research suggests that several, especially some historic sites and structures, will require more than one year to develop. These are being considered for possible incorporation into the long range product development strategy.

G. ORGANIZATION FOR IMPLEMENTATION

The preceeding sections describe the steps and processes that lead to an investment strategy for economic development through regional travel and tourism. In the demonstration project, leadership is the responsibility of the research team and the West

Virginia Governor's Office of Economic and Community Development. For most regions making use of this manual, there is a parallel state-level organization to serve in a similar role.

Future use of the manual, however, will not have an academic research team to provide the main organizational function. It is the objective of the demonstration project that this not be needed, although regional colleges and universities may well be called upon for information, technical assistance, and to assist in data collection and analysis.

The main organizational force should derive from the community itself. This may be from a regional travel council, chamber of commerce, county planning office, or others. Or, it may be developed around a combination of these. The manual provides technical guidance and much of the rationale for fostering regional travel and tourism growth. But in all areas, the initiative and organizing force will have to come from those in the community having the interest and dedication to undertake such projects.

APPENDIX A

PROJECT HIGHLIGHTS

CREATING ECONOMIC GROWTH AND JOBS THROUGH TRAVEL AND TOURISM: A MANUAL FOR COMMUNITY AND BUSINESS DEVELOPERS

PURPOSE:

The purpose of the project in West Virginia is to develop travel planning guidelines for local areas for use in investment strategies for overall economic development of the community.

OBJECTIVES:

The project's specific objectives include producing and testing guidelines for communities and regions to use to design and implement plans for economic development and growth through the travel industry. These guidelines are designed to assist regions, states, and cities to identify and describe the dimensions and essential nature of the tourism industry within the context of their specific community needs. This procedure will assist in the development of investment strategies which are based on the needs and resources of the area.

PROGRAM ELEMENTS:

The program elements include the analysis and design of the project and the evaluation and test of the project.

Phase I, which involves the analysis and design of the project, includes the resources inventory, the analysis of resources and selection of the demonstration county, the community resources and environmental surveys, the statewide economic impact survey, the segmentation analysis, forecasts and the preliminary manual on guidelines.

Phase II of the project, which involves the evaluation and testing of the project, includes an economic impact measurement, marketing, community information and awareness, industry awareness and identification, human resources development, community involvement and the publication of an expanded version of the manual guidelines in June 1980. (The campground portion of the manual, which was initiated in September 1978, and the final report, will be published in the fall of 1980.

Project Sponsorship and Costs

	<u>Phase I</u>	<u>Phase II</u>		<u>Total</u>
West Virginia University	\$ 28,000	\$ 64,000		\$ 92,000
West Virginia Governor's Office of Economic and Community Development	41,000	37,000 29,000	(7/77-6/79) (7/79-12/79)	107,000
United States Travel Service (DOC)	58,000	25,000		83,000
Economic Development Administration (DOC)	—0—	37,000		37,000
Employment & Training Administration (DOL)	—0—	31,000		31,000
Small Business Administration	<u>—0—</u>	<u>23,000</u>		<u>23,000</u>
	\$127,000	\$246,000		\$373,000

Contacts

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West Virginia Governor's Office of Economic and Community Development	Joe Fowler Director, Travel Development Division	(304) 348-2286
U.S. Dept. of Commerce, United States Travel Services, Office of Policy and Research	Marie Gillespie Program Analyst	(202) 377-4028
U.S. Dept. of Commerce, Economic Development Administration, Economic Policy and Planning, Office of Economic Research	Paul Braden, Ph.D. Economist	(202) 377-5059
U.S. Department of Labor, Employment and Training Admin., Office of Research and Develop- ment, Division of Program Demonstration	Richard McAllister Deputy Chief	(202) 376-7351
U.S. Dept. of Housing and Urban Development, Policy Development and Research, Office of Policy Development and Program Evaluation	Robert Etchison Special Assistant to the Deputy Assistant Secretary for Policy	(202) 755-8106
Small Business Administration Planning and Research; Energy, Environment and Competitive Structure Division	Linda Zarow Economist	(202) 653-6521
Region VI Planning and Development Council (West Virginia)	Robert J. Stone Program Director Economic Development	(304) 266-5693
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APPENDIX B

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CREATING ECONOMIC GROWTH AND JOBS THROUGH TRAVEL AND TOURISM: A MANUAL FOR COMMUNITY AND BUSINESS DEVELOPERS

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APPENDIX C

1978

SURVEY OF WEST VIRGINIA TRAVELERS' ACCOMODATIONS

INSTRUCTIONS: Please complete the following as indicated. The information requested is for the year January 1 - December 31, 1977. If specific numbers are requested, please provide them as accurately as possible; estimate if you have to but please do not leave blanks. Ignore the numbers in the column to the right; they are for tabulation purposes only.

1. Name of County in which your facility is located. _____			
2. Please check (✓) the category that best describes your business.		DO NOT WRITE IN THIS SPACE	
_____ Hotel	_____ Motel/Motor Hotel with restaurant	(1) _____	(TC)
_____ Resort Hotel	_____ Motel/Motor Hotel without restaurant	(2-3) _____	(1)
_____ Tourist Court or Home		(4) _____	
3. Please check (✓) any of the following that you provide for your guests.		(5) _____	(2)
_____ pool	_____ cocktail lounge	(6-8) _____	(7)
_____ games area	_____ meeting rooms (Specify) _____	(9-10) _____	(3)
4. Which one of the following interstate highways is your facility closest to? (Check only one.)		(11-13) _____	(3)
_____ I 64	_____ I 70	(14-15) _____	(11)
_____ I 77	_____ I 81	(16-17) _____	(8)
_____ I 79	_____ I 460	(18-37) _____	(13)
5. What is the distance from your facility to the nearest access point to that highway? _____ mi.			
6. Is your facility open all year? _____ Yes _____ No			
If NO, please check (✓) the months when it is NOT OPEN			
_____ Jan	_____ Feb	_____ May	_____ June
_____ July	_____ Aug	_____ Sept	_____ Oct
_____ Nov	_____ Dec		
7. How many rooms or units did you have available for travelers in 1977? _____			
8. What was the average number of persons that occupied one room or unit? (Please estimate if necessary.) _____			
9. Please estimate the percentage of your guests that came from outside of West Virginia. _____ %		(38-39) _____	(9)
10. How many room-nights* did you sell in 1977? _____		(40) _____	(6)
(*One room-night equals one or more persons occupying one room or unit for one night. Thus, if one guest occupies a room for two nights, that would be two room-nights; but, if two or more people occupy the same room for one night, that would be only one room-night.)		(41-52) _____	(6)
11. What was your average occupancy rate for 1977? _____ %			
(That is, what percent of your rooms were occupied on the average during the period of time that your facility was open. Please estimate if necessary.)		(53-54) _____	
12. For the first half of this year, 1978, would you estimate the occupancy rate to be: _____ Higher than last year. How much higher? _____ %		(55-56) _____	
_____ About the same as last year.		(57-59) _____	(12)
_____ Lower than last year. How much lower? _____ %		(60-62) _____	
13. What were your 1977 room rates? (Please write in spaces below.)		(63) _____	(4)
SINGLE: From \$ _____ (minimum) to \$ _____ (maximum)		(64) _____	(5)
DOUBLE: From \$ _____ (minimum) to \$ _____ (maximum)		(65-66) _____	(14-15)
FOR EACH ADDITIONAL PERSON: \$ _____		(67) _____	(16)
		(77-80) _____	

You would probably like to see an increase in travel and tourism in your area because it would benefit your business. However, other businesses and residents in your area may have mixed feelings. More travelers would provide more tax revenues, jobs, and sales. But, it could also cause increased traffic congestion, customer theft or even rising prices.

14. In your opinion, what overall effect would residents of your area expect from an increase in travel and tourism in your community?	Positive Effect _____	No Effect _____	Negative Effect _____
15. In your opinion, what overall effect would businesses in general in your area expect from an increase in travel and tourism in your community?	Positive Effect _____	No Effect _____	Negative Effect _____

In order to serve more travelers, it may be necessary for your business or other travel related businesses to expand.

16. Do you feel that the banks and financial institutions in your area are equally, more, or less willing to make loans to travel related businesses such as yours as they are to make loans to other types of business?	More Willing _____	Equally Willing _____	Less Willing _____
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APPENDIX D

NUMBER OF RECREATION FACILITIES IN THE MOUNTAINEER COUNTRY TRAVEL COUNCIL REGION BY COUNTY AND BY TYPE

(Sample Table)

County

Recreation Facilities	Barbour	Doddridge	Harrison	Lewis	Marion	Monongalia	Preston	Taylor	Upshur	Total
Golf Courses	1	0	5	1	3	8	2	2	1	23
Ski Slopes	0	0	0	0	0	1	1	0	0	2
Tennis Facilities	2	1	4	3	4	6	5	1	2	28
Race Tracks	0	0	1	1	1	1	2	0	0	6
Dude Ranch/Farm Vacation	1	0	0	0	0	0	1	0	0	2
Marina and Water Facilities	0	0	2	0	2	3	2	1	0	10
Playgrounds with Equipment	10	10	41	14	43	96	4	10	0	228
Swimming (pools and areas)	2	0	4	5	4	7	3	2	2	29
Baseball/Softball Facilities	3	1	4	8	7	7	4	2	3	39
Total	19	12	61	32	64	129	24	18	8	367



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